



DATE: September 8, 1997

TO: Distribution

SUBJECT: PARLIAMENT LIGHTS KINGS BOX - Section 24 Performance Week Ending 8/23/97

Attached are the weekly flash reports for the Parliament Lights Kings Box expansion in Section 24 for the week ending 8/23/97. Please note that the visibility audits are now conducted on a bi-weekly basis. They are not included in this report, but will be in next week's report. Key findings are summarized below.

Share

During the week ending 8/23/97, Parliament Lights KSB experienced its largest gain (+ .17) for AOC since its expansion. This growth could be attributed to a widening price gap between Parliament and other premium brands in C-stores during this period (see Pricing section). Share for the KSB packing at .63% has now surpassed the 0.5% share goal set for AOC in Section 24. This increase was driven by significant gains in C-stores (+ .25), while share in supermarkets continued to remain stable. Based on these gains for the KSB packing as well as the Kings Soft packing (+ .15), share for total Parliament rose .21 points to reach 1.09% in AOC. Since the packing's expansion, KSB has grown .42 share points in AOC and .60 share points in C-stores. Share in supermarkets, however, has remained relatively unchanged since the KSB expansion.

Similarly, share in stores stocking KSB gained .20 points, driven by C-store increases (+ .31) for the week ending 8/23/97. The Kings Soft packing also incurred large gains (+ .39) in C-stores during that week.

During the week ending 8/23/97, shares of all other OPB's in Section 24 were relatively stable (+ .04) in AOC, despite declines in C-stores (- .12). In supermarkets, shares of total other OPB's continued to remain relatively stable (- .03) during the week.

Distribution

Distribution of KSB appears to be leveling off at approximately two-thirds of C-stores and supermarkets as it continued to remain relatively unchanged for the second consecutive week in both trade classes. However, distribution of the 100's packing did show declines (- 4.0) in C-stores during the week.

Causal

For the week ending 8/23/97, causal offers increased slightly in C-stores (+ 1.4), despite declines noted for the June B1G1F offer (- 3.7). In supermarkets, decreases in both the June offer (- 1.6) and the July 50¢ off two-packs promotion (- .74) drove the declines in overall causality (- 2.1). Based on these shifts, overall causality in C-stores (25.5%) is now sustained about evenly by the June and July offers, while supermarkets (10.5%) continue to be primarily sustained by the July price-off promotion.

2071177778

Pricing

Although overall causality in C-stores only changed slightly during the week ending 8/23/97, the pack price gap between Parliament KSB and other OPB's reached its widest margin at 19¢, 9¢ more than in the prior week. In supermarkets, this price gap was relatively unchanged, with Parliament selling at 21¢ below other OPB packs. While the price gap encompasses both visible and quiet money off, causal information gauges visible money off only, making quiet money off a likely contributor to the share gains shown in C-stores during the week.

Distribution:

NYO

M. Anton
J. Bonhomme
S. Fuller
A. Goldfarb
B. Iler
L. Johnson
S. LeVan
C. Levy
J. Mortensen
P. Nebosky
B. Neidle
A. Sinha
L. Steen
S. Subramanian
M. Waldman
B. Weinstein

Florida

S. Caldwell (Heathrow 407-333-1613)
A.B. Campbell (Pensacola 904-479-3268)
W. Cashion (Heathrow 407-333-1613)
J. Clary
P. Egan (Tampa 813-621-2231)
F. Messenger (Heathrow 407-333-1613)
D. Mudd (Deerfield Beach 954-698-0074)
G. Wren (Jacksonville 904-737-5065)

Y & R (212-210-5460)

B. Hartnett
K. McCloskey
L. Schwed

2071177779

PARLIAMENT LIGHTS KING SIZE BOX FLASH REPORT

PM SECTION 24

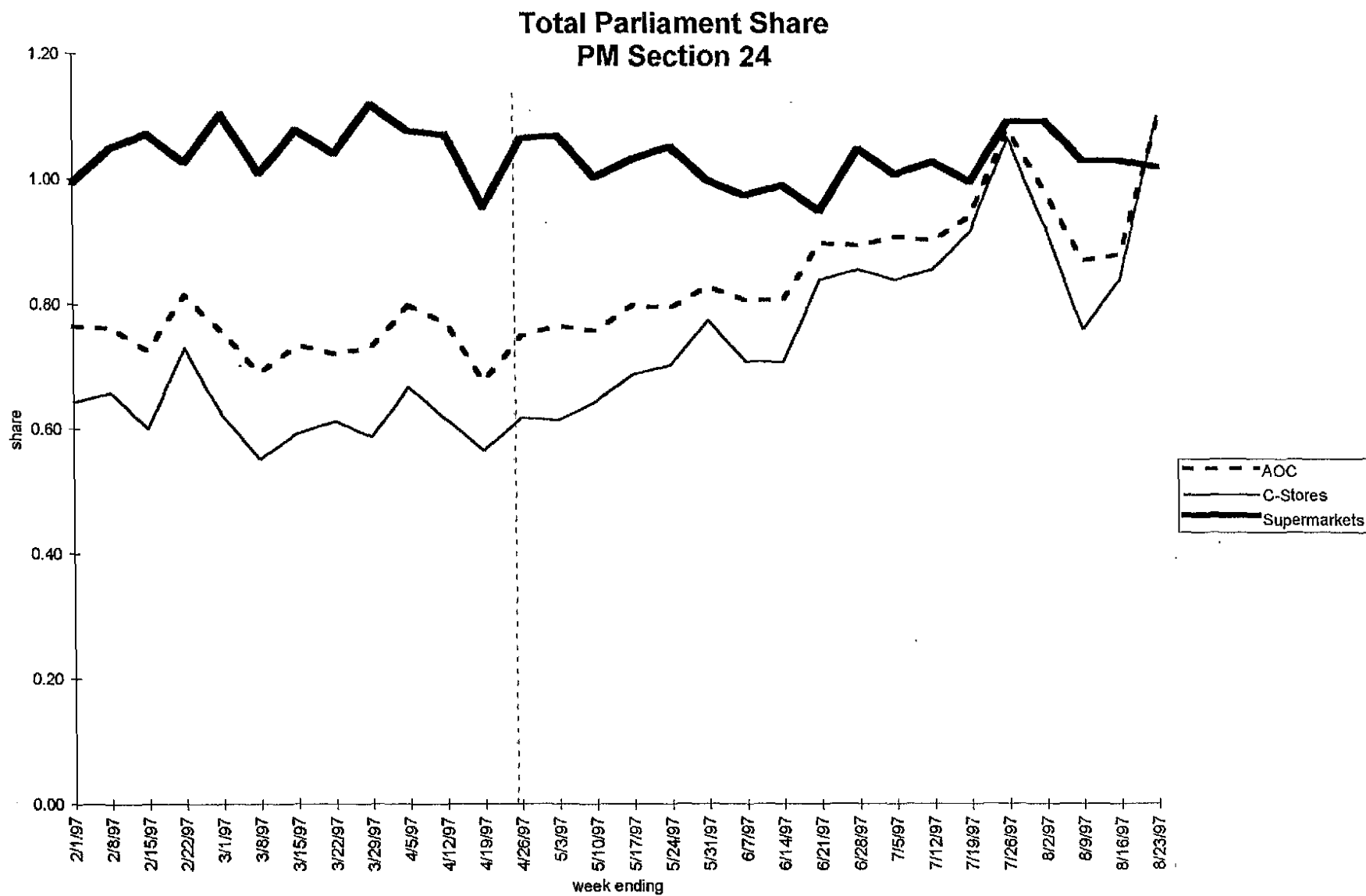
Week Ending 8/23/97

	AOC*				Supermarkets				C-Stores			
	Wk Ending 8/23/97	Diff. vs. Week Ago	Diff. vs. 4/26/97	Cum Since 5/3/97	Wk Ending 8/23/97	Diff. vs. Week Ago	Diff. vs. 4/26/97	Cum Since 5/3/97	Wk Ending 8/23/97	Diff. vs. Week Ago	Diff. vs. 4/26/97	Cum Since 5/3/97
Share												
Total Parliament	1.09	0.21	0.33	0.89	1.02	-0.01	-0.04	1.02	1.1	0.26	0.48	0.81
Kings Box	0.63	0.17	0.42	0.42	0.35	-0.02	0.01	0.34	0.73	0.25	0.6	0.44
Kings Soft	0.35	0.15	0.16	0.23	0.18	0	-0.01	0.2	0.42	0.2	0.21	0.25
100's	0.31	0.02	-0.05	0.32	0.52	0.02	-0.01	0.51	0.23	-0.01	-0.05	0.22
Share In Stores Stocking												
Total Parliament	1.29	0.22	0.34	1.06	1.09	-0.02	-0.04	1.1	1.35	0.28	0.53	0.98
Kings Box	0.97	0.2	0.33	0.71	0.53	-0.03	-0.04	0.53	1.11	0.31	0.53	0.73
Kings Soft	0.64	0.27	0.31	0.43	0.28	0	-0.02	0.31	0.83	0.39	0.47	0.47
100's	0.47	0.06	-0.04	0.46	0.61	0.03	0.02	0.59	0.39	0.03	-0.07	0.38
Other OPB Share												
Total	8.81	0.04	-0.52	9.11	12.23	-0.03	0.04	12.15	7.36	-0.12	-0.5	7.75
Merit	2.01	-0.04	-0.27	2.12	2.68	0.04	-0.01	2.63	1.79	-0.06	-0.27	1.93
Virginia Slims	3.02	0.07	-0.21	3.12	4.12	-0.01	0	4.07	2.59	0.05	-0.14	2.7
Benson & Hedges	3.78	0.01	-0.05	3.87	5.43	-0.06	0.05	5.45	2.98	-0.11	-0.09	3.12
Key Competitive Brand's Share												
Marlboro	37.17	-0.26	1.18	36.03	30.45	-0.48	-0.91	30.64	38.78	-0.19	1.77	37.29
Camel	4.12	-0.08	0.07	4.29	2.48	0.02	0.11	2.46	4.86	-0.07	0	5.11
Winston	6.41	0.55	0.86	5.93	6.7	0.07	0.12	6.71	6.43	0.86	1.19	5.72
Newport	4.71	-0.17	-0.19	4.93	3.94	0.14	0.18	4.1	5.01	-0.34	-0.45	5.34
Lucky Strike	0.2	0	0	0.18	0.24	-0.04	0.01	0.25	0.17	-0.01	0	0.15
Total Discount	24.52	-0.25	-1.03	25.25	21.06	0.16	0.68	21.12	25.68	-0.32	-1.88	26.67
Distribution												
Total Parliament	NA			NA	93	1	1	93	85	0	9	88
Kings Box	NA			NA	67	0	6	69	64	1	23	72
Kings Soft	NA			NA	60	-1	-1	62	53	-1	-6	63
100's	NA			NA	85	0	-3	85	67	-4	10	74
% Causal - Kings Box												
Total	NA			NA	10.54	-2.1	NA	NA	25.53	1.36	NA	NA
B1G1F w/Hologram pack	NA			NA	3.27	-1.58	NA	NA	10.25	-3.67	NA	NA
\$.50 off 2-pack	NA			NA	7.28	-0.74	NA	NA	8.89	0	NA	NA
Price Gap vs Selected OPB - Pack												
Total Parliament	NA			NA	\$ -	NA	NA	NA	\$ -	NA	NA	NA
Kings Box	NA			NA	\$ 0.21	NA	NA	NA	\$ 0.19	NA	NA	NA
Kings Soft	NA			NA	\$ -	NA	NA	NA	\$ -	NA	NA	NA
100's	NA			NA	\$ -	NA	NA	NA	\$ -	NA	NA	NA
Price Gap vs Selected OPB - Carton												
Total Parliament	NA			NA	\$ -	NA	NA	NA	NA	NA	NA	NA
Kings Box	NA			NA	\$ (0.01)	NA	NA	NA	NA	NA	NA	NA
Kings Soft	NA			NA	\$ -	NA	NA	NA	NA	NA	NA	NA
100's	NA			NA	\$ -	NA	NA	NA	NA	NA	NA	NA

Source: Nielsen Projected Store Level Data

*AOC includes Supermarkets, Convenience Stores, Drug Stores, and Mass Merchandisers. The latter two are not shown due to small base sample

2071177780

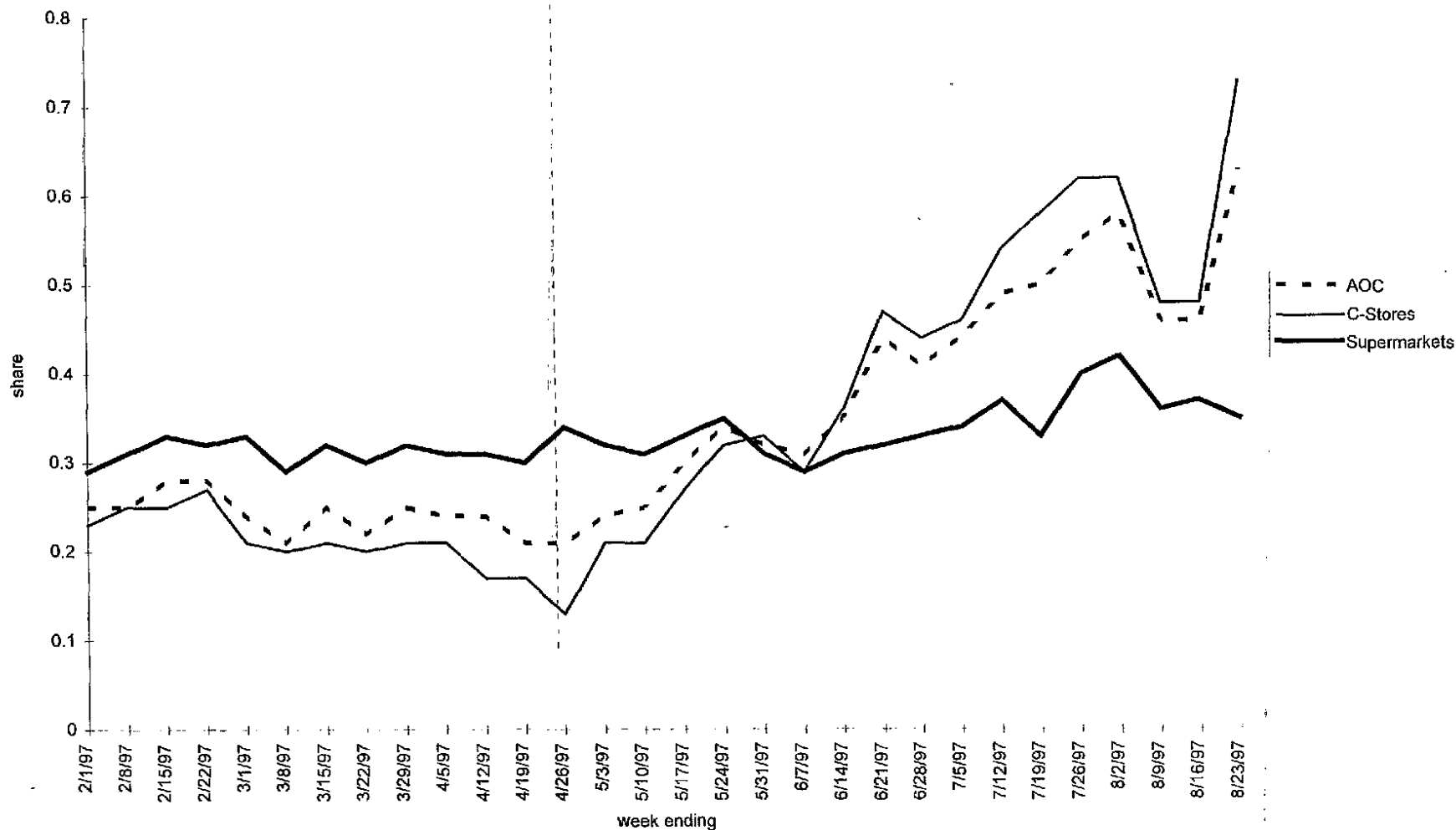


2071177781

Source: Nielsen, Projected Store Level Data

Note: AOC includes Supermarkets, C-Stores, Drug Stores, and Mass Merchandisers; the latter two are not shown due to small base sizes

Total Share Parliament Lts Kings Box PM Section 24



2071177782

Source: Nielsen Projected Store Level Data

Note: AOC includes Supermarkets, C-Stores, Drug Stores, and Mass Merchandisers; the latter two are not shown due to small base sizes

Parliament Lts Kings Box Share in Stores Stocking PM Section 24

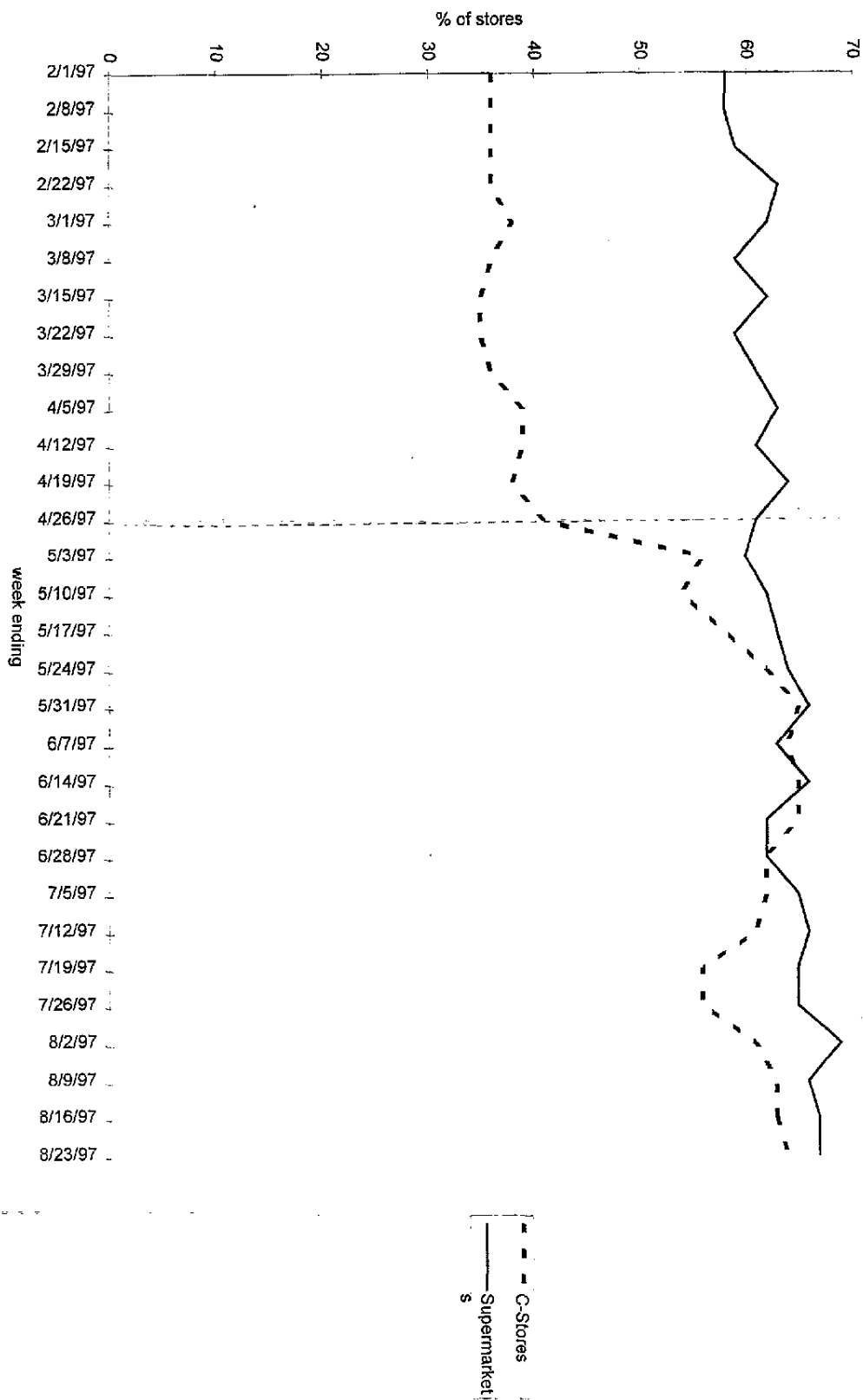


2071177783

Source: Nielsen Projected Store Level Data

Note: AOC includes Supermarkets, C-Stores, Drug Stores, and Mass Merchandisers; the latter two are not shown due to small base sizes

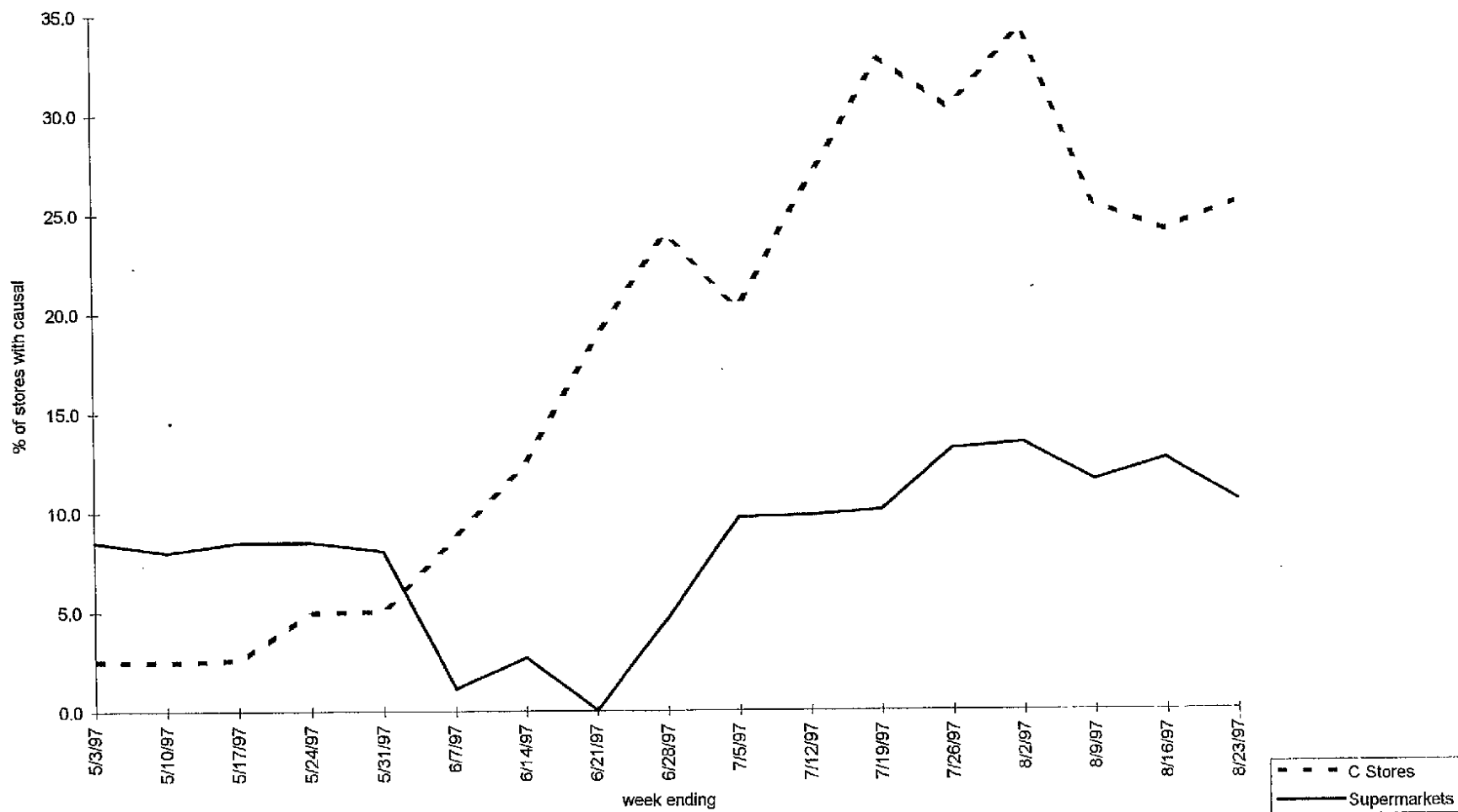
Parliament Lts Kings Box Distribution PM Section 24



207117784

Source: Nielsen Projected Store Level Data

Parliament Lts Kings Box % Causal
PM Section 24



2071177785

Source: Nielsen Projected Store Level Data